

FUNCTIONAL TITLE: Account Analyst
LOCATION: Massachusetts Teachers' Retirement System
500 Rutherford Avenue, Suite 210, Charlestown, MA 02129
STARTING SALARY: \$49,421
APPLICATION DEADLINE: Friday, July 30, 2021

The Massachusetts Teachers' Retirement System ("MTRS") is the pension plan for the Commonwealth's public school educators. The plan provides retirement, disability and survivor benefits to more than 67,000 recipients and maintains and services retirement accounts for more than 91,000 active members and 29,000 inactive members. On a monthly basis, the MTRS collects contributions and related data for all active members from more than 400 local school districts.

GENERAL STATEMENT OF DUTIES:

Under the general supervision of the Director and Assistant Director of the Transfers, Refunds, and Enrollments Unit, the Account Analyst serves all members of the MTRS as part of the team responsible for all aspects of member account maintenance including, but not limited to enrollments, transfers-in/out, incorrect assessment backlog resolution, account refunds, and required minimum distributions under the Internal Revenue Code.

The Account Analyst will be responsible for:

- Request and process transfers-in of eligible members' accounts from other Massachusetts contributory retirement systems, including the accurate and timely processing of regular retirement contributions, interest, and creditable service.
- Work with TREU Administrative Assistant to administer all steps of the time-sensitive *RetirementPlus* election process for all eligible transfer-in members, including determining eligibility, identifying Membership Tier, sending reminder and final disposition letters, tracking and entering responses, and updating members' *RetirementPlus* status and contribution rates.
- Initiate contribution rate changes after *Retirement Plus* elections have been made.
- Process and calculate incorrect assessment refunds and invoices.
- Assist with member enrollments, account refunds and transfers-out as assigned.
- Respond professionally to a variety of written and telephone inquiries from other MTRS staff, other MA contributory retirement systems, and members.
- Monitor and maintain unit tracking spreadsheets.
- Perform account research and appropriate follow-up.
- Implement special projects as assigned by the Director and Assistant Director of the Transfers, Refunds, and Enrollment Unit.
- Help maintain accurate and up-to-date personal information for our membership, and update accounts with detailed notes.

- Participate fully in agency projects, service group meetings, work group committees, and training programs as assigned.

QUALIFICATIONS REQUIRED:

- Commitment to quality service.
- Bachelor's degree in related field preferred, or equivalent relevant experience.
- Excellent mathematical skills.
- Ability to maintain complex records and prepare periodic reports from such records with careful attention to detail.
- Ability to communicate effectively and professionally with the public; well-developed writing skills; the ability to communicate complex information concisely and effectively in writing, in person and via telephone.
- Accurate and swift data entry skills.
- Ability to understand and interpret retirement laws and regulations.
- Ability to follow instructions and function both independently and as a member of a team.
- Demonstrated ability to meet deadlines and accomplish set goals.
- Pays close attention to details; reviews work before passing it on.
- Ability to establish and maintain effective and congenial working relationships with the membership, employers, other members of the public and MTRS staff.
- Experience with Microsoft Office Suite and financial reporting software preferred.
- Willingness to travel within the state.

APPLICATION PROCESS:

Interested applicants must apply online through *MassCareers* at:

<https://massanf.taleo.net/careersection/ex/jobsearch.ftl?ftlcompclass=LoginComponent>

All applicants must submit a cover letter and résumé. The cover letter must address why the applicant's experience and skillset would make them a good candidate for the position of the Account Analyst with the MTRS. **Applicants who do not submit a cover letter will not be considered.** Selected applicants may be invited to take a test designed to evaluate their basic writing, math and computer skills.

The MTRS is an equal opportunity employer.